



# Quarterly ACA Checklist

## The ACA is complicated and Tango Health can help.

Whether you handle ACA reporting in-house, or are researching new service providers, Tango Health can be your fully-outsourced solution for ACA compliance and reporting. Tango's powerful software and ACA experts will aggregate data from your many sources to help minimize audits and exposure to costly penalty risks.

Your Client Manager guides you through the entire process and assists your HR Team with planning, calculations, printing and filing.

**This checklist is one we use with our current clients to help them stay on track all year long.**



## CLEANUP

April - June  
(2nd Quarter)

- Reprint corrected 1095-Cs for employees after IRS submission
- Review current IRS documentation and determine how to handle IRS transmission errors
- Notify Auditor and Finance departments of any MEC penalty risk
- Discuss any upcoming changes with vendors who will provide ACA data for the following year

Make ACA part of the conversation during your third-party implementation process

Confirm you can track all the data you need for ACA reporting

Automate reports and exports to make obtaining ACA data easier

- Remind employees how to report unpaid leave of absences



## PLANNING

July - September  
(3rd Quarter)

- Determine who will print 1095-C documents
- Spot check 1-5% of your employee-base to ensure Affordability and Offer of Coverage codes are accurate
- Review Measurement Period data before Open Enrollment to ensure all eligible employees are offered coverage, especially unique employee groups (e.g. interns, seasonal, and variable hour)
- Manage tasks related to Open Enrollment the following year

Remind employees to confirm their personal information (dependent SSN, name changes, etc.)

Confirm bargaining units comply with ACA reporting for union-sponsored plans

Review plans with broker to ensure all employees are offered a plan that is affordable



### Tips for Mergers & Acquisitions

- Understand ACA implications of any merger or acquisition (Stock VS Asset)
- Negotiate early to obtain necessary ACA data before and during acquisition



## PREPARATION

October - December  
(4th Quarter)

- Comply with your stability periods by EIN and “break in service” (13-week) rule to avoid the penalties
- Create internal communication for employees with ACA-reporting milestones and FAQs
- Set up an ACA timeline for the next reporting year
- Confirm 1095-C printing timelines with vendors for first print and corrections
  - Review IRS submission deadlines with vendors
  - Communicate ACA and vendor milestones with your HR team
  - Research how your company will submit to the IRS (electronically or paper)
- Submit a test electronic 1094-C file to the IRS and resolve format errors
- Verify both EIN and Company Name are accurate for IRS submission



## FILING

January - March  
(1st Quarter)

- Review returned W-2 mail and update internal database (SSN and addresses)
- Determine how your team will handle returned mail and replacement 1095-C forms
- Document “good faith effort” steps for new reporting year
- Confirm if you need to file for an extension for 1095-C and/or 1094-C
- Print 1095-C forms
- Resolve known errors on 1095-C form prior to IRS submission
- Submit 1094-C forms to IRS
- Fix IRS transmission errors and resubmit to IRS

To find out more about Tango’s ACA Compliance & Reporting Solution, visit [tangohealth.com](https://tangohealth.com) or call 855.468.2646